



# Annual Agency Detail Position Budgeting

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### Archive Original Budget

- 1) Click "Planning Profile" tab
- 2) Double click "Annual Agency Profile" or "Annual Agency Approval Profile"
- 3) Click "Set Variables" tab
  - a) Verify Budget Prep Version "From Value" is set to "1A"
  - b) Verify correct Business Area is listed
- 4) Place cursor in "From Value" cell of Variable "Cost Center" and select the drop down menu
- 5) Enter the Cost Center range for Business Area (All other users from agency will be blocked from using the cost centers that have been selected)
- 6) Highlight line and click green check mark
- 7) Place cursor in "From Value" cell of Variable "VSCEN" and select the drop down menu
- 8) Highlight "A5" and click green check mark
- 9) Click "Save"
- 10) Click "Planning" tab
- 11) Expand "Budget Preparation Annual"
- 12) Expand "Annual Agency Position Budgeting (Cost Center)"
- 13) Double click "Cost Center Package"
- 14) Expand "Set Scenarios"
- 15) Double click "Save Scenario A to Scenario (VSCEN)"
- 16) Click "Save"
- 17) Expand "Manual Planning"
- 18) Double click "Multiple Cost Center Position Budgeting"
- 19) Click "Yes" to enable macros
- 20) Click "Close Navigation" tab
- 21) Click "Other Combination" icon, change Scenario to "A5"
- 22) Click green check mark
- 23) Click "Other Combination" icon, change back to Scenario to "A"
- 24) Click green check mark

## Annual Agency Detail Position Budgeting

### Accessing Position Layout

- 1) Click “Planning Profile” tab
- 2) Double click “Annual Agency Profile” or “Annual Agency Approval Profile”
- 3) Click “Set Variables” tab
  - a) Verify Budget Prep Version “From Value” is set to “1A”
  - b) Verify correct Business Area is listed
- 4) Place cursor in “From Value” cell of Variable “Cost Center” and select the drop down menu
- 5) Enter the Cost Center range for Business Area, an individual cost center or multiple single value cost centers (All other users from agency will be blocked from using the cost centers that have been selected)
- 6) Highlight line and click green check mark
- 7) If working in multiple single value cost centers, highlight the “Cost Center” variable line and click on the trash can icon
- 8) Click “Save”
- 9) Click “Planning” tab
- 10) Expand “Budget Preparation Annual”
- 11) Expand “Annual Agency Position Budgeting (Cost Center)”
- 12) Double click “Cost Centers Package”
- 13) Expand “Manual Planning”
- 14) Double click “Multiple Cost Center Position Budgeting”
- 15) Click “Yes” to enable macros
- 16) Click “Close Navigation” tab
- 17) Verify layout is in Scenario “A” and Status is “Not Ready”  
(Functions only apply to Scenario “A” and Status “Not Ready”)

## Annual Agency Detail Position Budgeting Distribute Salary Amounts to July

- 1) Click “Planning Profile” tab
- 2) Double click “ Annual Agency Profile” or “Annual Agency Approval Profile”
- 3) Click “Set Variables” tab
  - a) Verify Budget Prep Version “From Value” is set to “1A”
  - b) Verify correct Business Area is listed
- 4) Place cursor in “From Value” cell of Variable “Cost Center” and select the drop down menu
- 5) Enter the Cost Center range for Business Area (All other users from agency will be blocked from using the cost centers that have been selected)
- 6) Highlight line and click green check mark
- 7) Click “Save
- 8) Click “Planning” tab
- 9) Expand “Annual Agency Position Budgeting (Cost Center)”
- 10) Double click “Cost Center Package”
- 11) Expand “Distribute to Periods”
- 12) Right click “1 Period” and select “Display Parameter Group” to close the Excel layout
- 13) Double Click “1 Period”
- 14) Click ”Save”

## Annual Agency Detail Position Budgeting Adjust the Salary Amount on a Position

- 1) Locate position number to be adjusted
- 2) Locate salary amount to be adjusted
- 3) Change the amount for the position in July
- 4) Click “sort newly entered data” icon
- 5) Click “Save”



## Annual Agency Detail Position Budgeting Positions that will not be Budgeted

- 1) Locate position number to be adjusted
- 2) Locate salary amount to be adjusted
- 3) Change the amount on the position to 0 (zero) in July
- 4) Change the months on the position to 0 (zero)
- 5) Click on "sort newly entered data" icon
- 6) Click "Save"

## Annual Agency Detail Position Budgeting Cost Distribution-One Fund/Funds Center to Two

- 1) Locate position number to be distributed
- 2) Highlight protected fields (position/job/commitment item/cost element/CLIP flag/employee # if a filled position) and press “Ctrl C” to copy
- 3) Place cursor in the unprotected field you are copying to and press “Ctrl V” to paste
- 4) Place cursor in blank unprotected cost center field (key in cost center or search; steps 5-8)
- 5) Click “Possible Entries” icon
- 6) Click “Restrict Values” icon
- 7) Enter “Business Area” and/or “Funds Center” and click green check
- 8) Choose “Cost Center” from selections and click green check
- 9) With cursor in the cost center field, press “Ctrl W” to derive fund/funds center assignment. If it does not automatically appear for you, manual entry may be required.
- 10) Enter correct portion of salary amount in July for new cost center/fund/funds center
- 11) Change number of months from 12 to 6 (or other increment)
- 12) Reduce salary in July on original cost center/fund/funds center
- 13) Change number of months from 12 to 6 (or other increment)
- 14) Click on “sort newly entered data” icon
- 15) Click “Save”

## Annual Agency Detail Position Budgeting Remove Cost Distribution

- 1) Locate position number to be adjusted
- 2) Enter total salary amount in July on the cost center/fund/funds center you are wanting to budget
- 3) Change months to 12 on cost center you are budgeting
- 4) Reduce salary amount to 0 (zero) in July on other cost center/fund/funds center
- 5) Change months to 0 on cost center you are not budgeting
- 6) Click "Save"



## Annual Agency Detail Position Budgeting

### Change Cost Center on Position

- 1) Locate position number that needs cost center changed
- 2) Highlight position number and press “Ctrl C” to copy
- 3) Click “Display Navigation” tab
- 4) Click “Set Variables” tab
- 5) Place cursor in “From Value” cell of Position (FROM) and select the drop down menu
- 6) Place cursor in “Position” cell and press “Ctrl V” to copy position to drop down menu
- 7) Highlight line and click green check mark
- 8) Place cursor in “From Value” cell of “ New Cost Center” and select the drop down menu
- 9) Enter the Cost Center the position is to be changed to into the “New Cost Center” cell of the drop down menu
- 10) Highlight line and click green check mark
- 11) Repeat steps 8 – 10 for
  - a) Fund
  - b) Funds Center
- 12) Click “Save” on “Set Variable Screen”
- 13) Click “Planning” tab
- 14) Expand “Change Cost Center of Position”
- 15) Double click “Change Cost Center of Position”
- 16) Verify cost center for position has changed
- 17) Click ”Save”

## Annual Agency Detail Position Budgeting

### Change Fund / Fund Center Assignment on Cost Center

- 1) Agency submits cost center assignment change to DFA – Office of Budget. Assignment change is made in BPS and Agency is notified when update has been made in BPS.
- 2) Click “Display Navigation” tab
- 3) Locate position(s) that have cost center that the fund/funds center assignment has changed
- 4) Highlight position number and press “Ctrl C” to copy
- 5) Click “Set Variables” tab
- 6) Place cursor in “From Value” cell of Position (FROM) and select the drop down menu
- 7) Place cursor in “Position” cell and press “Ctrl V” to copy position to drop down menu (key in any additional positions)
- 8) Highlight line and click green check mark
- 9) You will need to clear the Position (FROM) parameters if applying function to more than one position. Highlight parameter and click on the trash can icon
- 10) Place cursor in “From Value” cell of “New Cost Center” and select the drop down menu
- 11) Enter the Cost Center the position is to be changed to into the “New Cost Center” cell of the drop down menu
- 12) Highlight line and click green check mark
- 13) Repeat steps 10 – 12 for
  - a) Fund
  - b) Funds Center
- 14) Click “Save” on “Set Variable” screen
- 15) Click “Planning” tab
- 16) Expand “Change Cost Center of Position”
- 17) Double click on “Change Cost Center of Position”
- 18) Verify Cost Center on position(s) has changed
- 19) Click “Save”